

## PRICELIST COVER PAGE

AUTHORIZED  
INFORMATION TECHNOLOGY SCHEDULE PRICELIST  
GENERAL PURPOSE COMMERCIAL INFORMATION TECHNOLOGY  
EQUIPMENT, SOFTWARE AND SERVICES

Socius specializes in providing ERP, CRM, Business Intelligence, and Collaboration solutions from Microsoft Dynamics and Sage, as well as technology based on Microsoft Office SharePoint Server. Headquartered in Dublin, Ohio, Socius proudly serves clients across the Midwest and beyond from its offices in Ohio, Kansas City, North Dakota, and California.

All of the above-referenced solutions are provided directly by Socius. As demonstrated by the materials submitted in Socius' offering to the Government, Socius is authorized to perform these solutions as an approved agent of Microsoft, the publisher of the software.

Socius takes a unique approach to its consulting services. Socius' relationships with its clients go beyond that of a typical vendor. By establishing close ties to its clients, Socius team members become proactive participants in meeting and exceeding client goals.

Socius' methodology begins with the client. By ensuring the client understands Socius' process and asking the client the right questions, Socius intimately understand the client's business needs today and where the client is headed in the future. Benchmarking and future planning are included in all of Socius' implementations because Socius believes in creating long-term, sustainable value through its solutions and empowering its clients to see the return they are receiving on their investments.

Socius does not view an implementation as the finish-line; it sees it as the starting point for an ongoing relationship in which it continues to educate and collaborate with its clients on the products and processes that will help them continue to succeed.

Through an extensive list of specialized consulting services and an array of software specific solution packages, Socius works to improve clients' productivity, empower clients' staff, streamline and automate clients' business processes, and allow clients to better understand and connect with their customers and partners.

With more than 1,000 implementations of ERP and CRM software applications from Microsoft Dynamics, Sage, and SYSPRO, Socius' business relationships are the best indicator of its experience and demonstrated excellence.

Below are the applicable Special Item Numbers, FSC Classes, and FPDS Codes that Socius is offering to provide:

1. Special Item No. 132-50 Training Courses  
FSC/PSC Class U012 Information Training  
Training Courses for Information Technology Equipment and Software
2. Special Item No. 132-51 Information Technology Professional Services  
FSC/PSC Class D302 ADP Systems Development Services  
Systems Development Services  
FSC/PSC Class D306 ADP Systems Analysis Services  
Systems Analysis Services  
FSC/PSC Class D307 Automated Information System Svcs  
Automated Information Systems Services  
FSC/PSC Class D308 ADP Programming Services  
Programming Services

FSC/PSC Class D311 ADP Data Conversion Services  
Data Conversion Services

Socius1, LLC  
7003 Post Road, Suite 300, Dublin, Ohio 43016  
614.280.9880  
www.socius1.com

Contract Number: GS-35F-0337Y

Period Covered by Contract: April 12, 2012 – April 11, 2017

General Services Administration  
Federal Acquisition Service

Pricelist current through Modification #\_\_\_\_\_, dated \_\_\_\_\_.

Products and ordering information in this Authorized Information Technology Schedule Pricelist are also available on the GSA Advantage! System (<http://www.gsaadvantage.gov>).

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## INFORMATION FOR ORDERING ACTIVITIES APPLICABLE TO ALL SPECIAL ITEM NUMBERS

### **SPECIAL NOTICE TO AGENCIES: Small Business Participation**

SBA strongly supports the participation of small business concerns in the Federal Acquisition Service. To enhance Small Business Participation SBA policy allows agencies to include in their procurement base and goals, the dollar value of orders expected to be placed against the Federal Supply Schedules, and to report accomplishments against these goals.

For orders exceeding the micropurchase threshold, FAR 8.404 requires agencies to consider the catalogs/pricelists of at least three schedule contractors or consider reasonably available information by using the GSA Advantage!™ on-line shopping service ([www.gsaadvantage.gov](http://www.gsaadvantage.gov)). The catalogs/pricelists, GSA Advantage!™ and the Federal Acquisition Service Home Page ([www.gsa.gov/fas](http://www.gsa.gov/fas)) contain information on a broad array of products and services offered by small business concerns.

This information should be used as a tool to assist ordering activities in meeting or exceeding established small business goals. It should also be used as a tool to assist in including small, small disadvantaged, and women-owned small businesses among those considered when selecting pricelists for a best value determination.

For orders exceeding the micropurchase threshold, customers are to give preference to small business concerns when two or more items at the same delivered price will satisfy their requirement.

### **1. GEOGRAPHIC SCOPE OF CONTRACT:**

*Domestic delivery* is delivery within the 48 contiguous states, Alaska, Hawaii, Puerto Rico, Washington, DC, and U.S. Territories. Domestic delivery also includes a port or consolidation point, within the aforementioned areas, for orders received from overseas activities.

*Overseas delivery* is delivery to points outside of the 48 contiguous states, Washington, DC, Alaska, Hawaii, Puerto Rico, and U.S. Territories.

Offerors are requested to check one of the following boxes:

- ☒ The Geographic Scope of Contract will be domestic and overseas delivery.
- ☐ The Geographic Scope of Contract will be overseas delivery only.
- ☐ The Geographic Scope of Contract will be domestic delivery only.

For Special Item Number 132-53 Wireless Services ONLY, if awarded, list the limited geographic coverage area:

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### **2. CONTRACTOR'S ORDERING ADDRESS AND PAYMENT INFORMATION:**

Socius1, LLC  
7003 Post Road, Suite 300  
Dublin, Ohio 43016

Contractor must accept the credit card for payments equal to or less than the micro-purchase for oral or written orders under this contract. The Contractor and the ordering agency may agree to use the credit card for dollar amounts over the micro-purchase threshold (See GSAR 552.232-79 Payment by Credit Card). In addition, bank account information for wire transfer payments will be shown on the invoice.

The following telephone number(s) can be used by ordering activities to obtain technical and/or ordering assistance:

614.280.9880 or 800.589.6614

### 3. LIABILITY FOR INJURY OR DAMAGE

The Contractor shall not be liable for any injury to ordering activity personnel or damage to ordering activity property arising from the use of equipment maintained by the Contractor, unless such injury or damage is due to the fault or negligence of the Contractor.

### 4. STATISTICAL DATA FOR GOVERNMENT ORDERING OFFICE COMPLETION OF STANDARD FORM 279:

Block 9: G. Order/Modification Under Federal Schedule Contract  
Block 16: Data Universal Numbering System (DUNS) Number: 83-758-5601  
Block 30: Type of Contractor: B – other small business

- A. Small Disadvantaged Business
- B. Other Small Business
- C. Large Business
- G. Other Nonprofit Organization
- L. Foreign Contractor

Block 31: Woman-Owned Small Business - No  
Block 37: Contractor's Taxpayer Identification Number (TIN): 20-3011273  
Block 40: Veteran Owned Small Business (VOSB): N/A

- A: Service Disabled Veteran Owned Small Business
- B: Other Veteran Owned Small Business

- 4a. CAGE Code: 60EQ4
- 4b. Contractor has registered with the Central Contractor Registration Database.

### 5. FOB DESTINATION

### 6. DELIVERY SCHEDULE

- a. TIME OF DELIVERY: The Contractor shall deliver to destination within the number of calendar days after receipt of order (ARO), as set forth below:

#### SPECIAL ITEM NUMBER

#### DELIVERY TIME (Days ARO)

132 50

Socius is able to begin providing the services within one week of engagement. If expedited service is requested, Socius is able to begin providing the services immediately.

132 51

Socius is able to begin providing the services within one week of engagement. If expedited service is requested, Socius is able to begin providing the services immediately.

- b. URGENT REQUIREMENTS: When the Federal Supply Schedule contract delivery period does not meet the bona fide urgent delivery requirements of an ordering activity, ordering activities are encouraged, if time permits, to contact the Contractor for the purpose of obtaining accelerated delivery. The Contractor shall reply to the inquiry within 3 workdays after receipt. (Telephonic replies shall be confirmed by the Contractor in writing.) If the Contractor offers an accelerated delivery time acceptable to the ordering activity, any order(s) placed pursuant to the

agreed upon accelerated delivery time frame shall be delivered within this shorter delivery time and in accordance with all other terms and conditions of the contract.

c. i. SIN 132-54 and SIN 132-55, ACCELERATED SERVICE DELIVERY (7 calendar days or less): the time required for COMSATCOM services to be available after order award. Under Accelerated Service Task Orders, service acceptance testing, unless otherwise required by the satellite provider or host nation, shall be deferred until Ordering Activity operations permit.

ii. SIN 132-54 and SIN 132-55, TIME-CRITICAL DELIVERY (4 hours or less): the time required for COMSATCOM services to be available after order award. Under Time-Critical Task Orders, service acceptance testing unless otherwise required by the satellite provider or host nation shall be deferred until Ordering Activity operations permit. Time-Critical Delivery shall be predicated on the availability of COMSATCOM transponded capacity (contracted bandwidth and power, pre-arranged Host Nation Agreements, frequency clearance) or COMSATCOM subscription services (bandwidth, terminals, network resources, etc.).

iii. For SIN 132-54 and SIN 132-55, EXTENDED SERVICE DELIVERY TIMES: the time required under extenuating circumstances for COMSATCOM services to be available after order award. Such extenuating circumstances may include extended time required for host nation agreements or landing rights, or other time intensive service delivery requirements as defined in the individual requirement. Any such extended delivery times will be negotiated between the Ordering Activity and Contractor.

**7. DISCOUNTS:** Prices shown are NET Prices; Basic Discounts have been deducted.

- a. Prompt Payment: 0% - 0 days from receipt of invoice or date of acceptance, whichever is later.
- b. Quantity – N/A
- c. Dollar Volume – N/A
- d. Government Educational Institutions – N/A
- e. Other – As it pertains to discounts related to software, Socius will pass along to the Government the greater, but not both, of the following discounts: (i) any promotional discount occasionally offered by a software publisher or (ii) 10% off the listed software price.

As it pertains to professional services and training services, Socius is willing to offer to the Government the reduced rate of \$164.40 per hour. As of January 1, 2011, Socius typically charges \$175 per hour for professional and training services.

As it pertains to maintenance fees, Socius follows the industry standard and does not provide any discounts.

**8. TRADE AGREEMENTS ACT OF 1979, as amended:**

All items are U.S. made end products, designated country end products, Caribbean Basin country end products, Canadian end products, or Mexican end products as defined in the Trade Agreements Act of 1979, as amended, except as set forth in the following sentence. Socius is a software reseller, and Socius cannot confirm that the above representation is true with respect to the software it resells. The primary software Socius resells is Microsoft software.

**9. STATEMENT CONCERNING AVAILABILITY OF EXPORT PACKING:**

**10. Small Requirements:** The minimum dollar value of orders to be issued is \$0.00; there is no minimum order.

**11. MAXIMUM ORDER (All dollar amounts are exclusive of any discount for prompt payment.)**

- a. The Maximum Order value for the following Special Item Numbers (SINs) is \$500,000:
  - Special Item Number 132-3 - Leasing of Product
  - Special Item Number 132-4 – Daily / Short Term Rental
  - Special Item Number 132-8 - Purchase of Equipment
  - Special Item Number 132-9 - Purchase of Used or Refurbished Equipment
  - Special Item Number 132-12 - Equipment Maintenance
  - Special Item Number 132-32 - Term Software Licenses
  - Special Item Number 132-33 - Perpetual Software Licenses
  - Special Item Number 132-34 - Maintenance of Software as a Service
  - Special Item Number 132-51 - Information Technology Professional Services
  - Special Item Number 132-52 - Electronic Commerce (EC) Services
  - Special Item Number 132-53 – Wireless Services
  - Special Item Number 132-54 – Commercial Satellite Communications (COMSATCOM) Transponded Capacity
  - Special Item Number 132-55 – Commercial Satellite Communications (COMSATCOM) Subscription Services
- b. The Maximum Order value for the following Special Item Numbers (SINs) is \$25,000:
  - Special Item Number 132-50 - Training Courses
- c. The Maximum Order value for the following Special Item Numbers (SINs) is \$1,000,000:
  - Special Item Number 132-60A-F – Access Certificates for Electronic Services (ACES) Program
  - Special Item Number 132-61 – Public Key Infrastructure (PKI) Shared Service Provider (SSP) Program
  - Special Item Number 132-62 – HSPD-12 Product and Service Components

## **12. ORDERING PROCEDURES FOR FEDERAL SUPPLY SCHEDULE CONTRACTS**

Ordering activities shall use the ordering procedures of Federal Acquisition Regulation (FAR) 8.405 when placing an order or establishing a BPA for supplies or services. These procedures apply to all schedules.

- a. FAR 8.405-1 Ordering procedures for supplies, and services not requiring a statement of work.
- b. FAR 8.405-2 Ordering procedures for services requiring a statement of work.

## **13. FEDERAL INFORMATION TECHNOLOGY/TELECOMMUNICATION STANDARDS**

**REQUIREMENTS:** ordering activities acquiring products from this Schedule must comply with the provisions of the Federal Standards Program, as appropriate (reference: NIST Federal Standards Index). Inquiries to determine whether or not specific products listed herein comply with Federal Information Processing Standards (FIPS) or Federal Telecommunication Standards (FED-STDS), which are cited by ordering activities, shall be responded to promptly by the Contractor.

### **13.1 FEDERAL INFORMATION PROCESSING STANDARDS PUBLICATIONS (FIPS PUBS):**

Information Technology products under this Schedule that do not conform to Federal Information Processing Standards (FIPS) should not be acquired unless a waiver has been granted in accordance with the applicable "FIPS Publication." Federal Information Processing Standards Publications (FIPS PUBS) are issued by the U.S. Department of Commerce, National Institute of Standards and Technology (NIST), pursuant to National Security Act. Information concerning their availability and applicability should be obtained from the National Technical Information Service (NTIS), 5285 Port Royal Road, Springfield, Virginia 22161. FIPS PUBS include voluntary standards when these are adopted for Federal use. Individual orders for FIPS PUBS should be referred to the NTIS Sales Office, and orders for subscription service should be referred to the NTIS Subscription Officer, both at the above address, or telephone number (703) 487-4650.

**13.2 FEDERAL TELECOMMUNICATION STANDARDS (FED-STDS):** Telecommunication products under this Schedule that do not conform to Federal Telecommunication Standards (FED-STDS) should not be acquired unless a waiver has been granted in accordance with the applicable "FED-STD." Federal Telecommunication Standards are issued by the U.S. Department of Commerce, National Institute of Standards and Technology (NIST), pursuant to National Security Act. Ordering information and information concerning the availability of FED-STDS should be obtained from the GSA, Federal Acquisition Service, Specification Section, 470 East L'Enfant Plaza, Suite 8100, SW, Washington, DC 20407, telephone number (202)619-8925. Please include a self-addressed mailing label when requesting information by mail. Information concerning their applicability can be obtained by writing or calling the U.S. Department of Commerce, National Institute of Standards and Technology, Gaithersburg, MD 20899, telephone number (301)975-2833.

**14. CONTRACTOR TASKS / SPECIAL REQUIREMENTS (C-FSS-370) (NOV 2003)**

- (a) **Security Clearances:** The Contractor may be required to obtain/possess varying levels of security clearances in the performance of orders issued under this contract. All costs associated with obtaining/possessing such security clearances should be factored into the price offered under the Multiple Award Schedule.
- (b) **Travel:** The Contractor may be required to travel in performance of orders issued under this contract. Allowable travel and per diem charges are governed by Pub .L. 99-234 and FAR Part 31, and are reimbursable by the ordering agency or can be priced as a fixed price item on orders placed under the Multiple Award Schedule. Travel in performance of a task order will only be reimbursable to the extent authorized by the ordering agency. The Industrial Funding Fee does NOT apply to travel and per diem charges.
- (c) **Certifications, Licenses and Accreditations:** As a commercial practice, the Contractor may be required to obtain/possess any variety of certifications, licenses and accreditations for specific FSC/service code classifications offered. All costs associated with obtaining/ possessing such certifications, licenses and accreditations should be factored into the price offered under the Multiple Award Schedule program.
- (d) **Insurance:** As a commercial practice, the Contractor may be required to obtain/possess insurance coverage for specific FSC/service code classifications offered. All costs associated with obtaining/possessing such insurance should be factored into the price offered under the Multiple Award Schedule program.
- (e) **Personnel:** The Contractor may be required to provide key personnel, resumes or skill category descriptions in the performance of orders issued under this contract. Ordering activities may require agency approval of additions or replacements to key personnel.
- (f) **Organizational Conflicts of Interest:** Where there may be an organizational conflict of interest as determined by the ordering agency, the Contractor's participation in such order may be restricted in accordance with FAR Part 9.5.
- (g) **Documentation/Standards:** The Contractor may be requested to provide products or services in accordance with rules, regulations, OMB orders, standards and documentation as specified by the agency's order.
- (h) **Data/Deliverable Requirements:** Any required data/deliverables at the ordering level will be as specified or negotiated in the agency's order.
- (i) **Government-Furnished Property:** As specified by the agency's order, the Government may provide property, equipment, materials or resources as necessary.
- (j) **Availability of Funds:** Many Government agencies' operating funds are appropriated for a specific fiscal year. Funds may not be presently available for any orders placed under the contract or any option year. The Government's obligation on orders placed under this contract is contingent upon the availability of appropriated



funds from which payment for ordering purposes can be made. No legal liability on the part of the Government for any payment may arise until funds are available to the ordering Contracting Officer.

- (k) Overtime: For professional services, the labor rates in the Schedule should not vary by virtue of the Contractor having worked overtime. For services applicable to the Service Contract Act (as identified in the Schedule), the labor rates in the Schedule will vary as governed by labor laws (usually assessed a time and a half of the labor rate).

**15. CONTRACT ADMINISTRATION FOR ORDERING ACTIVITIES:** Any ordering activity, with respect to any one or more delivery orders placed by it under this contract, may exercise the same rights of termination as might the GSA Contracting Officer under provisions of FAR 52.212-4, paragraphs (l) Termination for the ordering activity's convenience, and (m) Termination for Cause (See 52.212-4)

**16. GSA ADVANTAGE!**

GSA Advantage! is an on-line, interactive electronic information and ordering system that provides on-line access to vendors' schedule prices with ordering information. GSA Advantage! will allow the user to perform various searches across all contracts including, but not limited to:

- (1) Manufacturer;
- (2) Manufacturer's Part Number; and
- (3) Product categories.

Agencies can browse GSA Advantage! by accessing the Internet World Wide Web utilizing a browser (ex.: NetScape). The Internet address is <http://www.gsaadvantage.gov>

**17. PURCHASE OF OPEN MARKET ITEMS**

NOTE: Open Market Items are also known as incidental items, noncontract items, non-Schedule items, and items not on a Federal Supply Schedule contract. ODCs (Other Direct Costs) are not part of this contract and should be treated as open market purchases. Ordering Activities procuring open market items must follow FAR 8.402(f).

For administrative convenience, an ordering activity contracting officer may add items not on the Federal Supply Multiple Award Schedule (MAS) -- referred to as open market items -- to a Federal Supply Schedule blanket purchase agreement (BPA) or an individual task or delivery order, **only if-**

- (1) All applicable acquisition regulations pertaining to the purchase of the items not on the Federal Supply Schedule have been followed (e.g., publicizing (Part 5), competition requirements (Part 6), acquisition of commercial items (Part 12), contracting methods (Parts 13, 14, and 15), and small business programs (Part 19));
- (2) The ordering activity contracting officer has determined the price for the items not on the Federal Supply Schedule is fair and reasonable;
- (3) The items are clearly labeled on the order as items not on the Federal Supply Schedule; and
- (4) All clauses applicable to items not on the Federal Supply Schedule are included in the order.

**18. CONTRACTOR COMMITMENTS, WARRANTIES AND REPRESENTATIONS**

a. For the purpose of this contract, commitments, warranties and representations include, in addition to those agreed to for the entire schedule contract:

- (1) Time of delivery/installation quotations for individual orders;

(2) Technical representations and/or warranties of products concerning performance, total system performance and/or configuration, physical, design and/or functional characteristics and capabilities of a product/equipment/ service/software package submitted in response to requirements which result in orders under this schedule contract.

(3) Any representations and/or warranties concerning the products made in any literature, description, drawings and/or specifications furnished by the Contractor.

b. The above is not intended to encompass items not currently covered by the GSA Schedule contract.

## **19. OVERSEAS ACTIVITIES**

The terms and conditions of this contract shall apply to all orders for installation, maintenance and repair of equipment in areas listed in the pricelist outside the 48 contiguous states and the District of Columbia, except as indicated below:

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Upon request of the Contractor, the ordering activity may provide the Contractor with logistics support, as available, in accordance with all applicable ordering activity regulations. Such ordering activity support will be provided on a reimbursable basis, and will only be provided to the Contractor's technical personnel whose services are exclusively required for the fulfillment of the terms and conditions of this contract.

## **20. BLANKET PURCHASE AGREEMENTS (BPAs)**

The use of BPAs under any schedule contract to fill repetitive needs for supplies or services is allowable. BPAs may be established with one or more schedule contractors. The number of BPAs to be established is within the discretion of the ordering activity establishing the BPA and should be based on a strategy that is expected to maximize the effectiveness of the BPA(s). Ordering activities shall follow FAR 8.405-3 when creating and implementing BPA(s).

## **21. CONTRACTOR TEAM ARRANGEMENTS**

Contractors participating in contractor team arrangements must abide by all terms and conditions of their respective contracts. This includes compliance with Clauses 552.238-74, Industrial Funding Fee and Sales Reporting, i.e., each contractor (team member) must report sales and remit the IFF for all products and services provided under its individual contract.

## **22. INSTALLATION, DEINSTALLATION, REINSTALLATION**

The Davis-Bacon Act (40 U.S.C. 276a-276a-7) provides that contracts in excess of \$2,000 to which the United States or the District of Columbia is a party for construction, alteration, or repair (including painting and decorating) of public buildings or public works with the United States, shall contain a clause that no laborer or mechanic employed directly upon the site of the work shall receive less than the prevailing wage rates as determined by the Secretary of Labor. The requirements of the Davis-Bacon Act do not apply if the construction work is incidental to the furnishing of supplies, equipment, or services. For example, the requirements do not apply to simple installation or alteration of a public building or public work that is incidental to furnishing supplies or equipment under a supply contract. However, if the construction, alteration or repair is segregable and exceeds \$2,000, then the requirements of the Davis-Bacon Act apply.

The ordering activity issuing the task order against this contract will be responsible for proper administration and enforcement of the Federal labor standards covered by the Davis-Bacon Act. The proper Davis-Bacon wage determination will be issued by the ordering activity at the time a request for quotations is made for applicable construction classified installation, deinstallation, and reinstallation services under SIN 132-8 or 132-9.

## **23. SECTION 508 COMPLIANCE.**

If applicable, Section 508 compliance information on the supplies and services in this contract are available in Electronic and Information Technology (EIT) at the following:

[www.socius1.com](http://www.socius1.com)

The EIT standard can be found at: [www.Section508.gov/](http://www.Section508.gov/).

**24. PRIME CONTRACTOR ORDERING FROM FEDERAL SUPPLY SCHEDULES.**

Prime Contractors (on cost reimbursement contracts) placing orders under Federal Supply Schedules, on behalf of an ordering activity, shall follow the terms of the applicable schedule and authorization and include with each order –

(a) A copy of the authorization from the ordering activity with whom the contractor has the prime contract (unless a copy was previously furnished to the Federal Supply Schedule contractor); and

(b) The following statement:

This order is placed under written authorization from \_\_\_\_\_ dated \_\_\_\_\_. In the event of any inconsistency between the terms and conditions of this order and those of your Federal Supply Schedule contract, the latter will govern.

**25. INSURANCE—WORK ON A GOVERNMENT INSTALLATION (JAN 1997)(FAR 52.228-5)**

(a) The Contractor shall, at its own expense, provide and maintain during the entire performance of this contract, at least the kinds and minimum amounts of insurance required in the Schedule or elsewhere in the contract.

(b) Before commencing work under this contract, the Contractor shall notify the Contracting Officer in writing that the required insurance has been obtained. The policies evidencing required insurance shall contain an endorsement to the effect that any cancellation or any material change adversely affecting the Government's interest shall not be effective—

(1) For such period as the laws of the State in which this contract is to be performed prescribe; or

(2) Until 30 days after the insurer or the Contractor gives written notice to the Contracting Officer, whichever period is longer.

(c) The Contractor shall insert the substance of this clause, including this paragraph (c), in subcontracts under this contract that require work on a Government installation and shall require subcontractors to provide and maintain the insurance required in the Schedule or elsewhere in the contract. The Contractor shall maintain a copy of all subcontractors' proofs of required insurance, and shall make copies available to the Contracting Officer upon request.

**26. SOFTWARE INTEROPERABILITY.**

Offerors are encouraged to identify within their software items any component interfaces that support open standard interoperability. An item's interface may be identified as interoperable on the basis of participation in a Government agency-sponsored program or in an independent organization program. Interfaces may be identified by reference to an interface registered in the component registry located at <http://www.core.gov>.

**27. ADVANCE PAYMENTS**

A payment under this contract to provide a service or deliver an article for the United States Government may not be more than the value of the service already provided or the article already delivered. Advance or pre-payment is not authorized or allowed under this contract. (31 U.S.C. 3324)

**TERMS AND CONDITIONS APPLICABLE TO PURCHASE OF  
TRAINING COURSES FOR GENERAL PURPOSE COMMERCIAL  
INFORMATION TECHNOLOGY EQUIPMENT AND SOFTWARE  
(SPECIAL ITEM NUMBER 132-50)**

**1. SCOPE**

- a. The Contractor shall provide training courses normally available to commercial customers, which will permit ordering activity users to make full, efficient use of general purpose commercial IT products. Training is restricted to training courses for those products within the scope of this solicitation.
- b. The Contractor shall provide training at the Contractor's facility and/or at the ordering activity's location, as agreed to by the Contractor and the ordering activity.

**2. ORDER**

Written orders, EDI orders (GSA Advantage! and FACNET), credit card orders, and orders placed under blanket purchase agreements (BPAs) shall be the basis for the purchase of training courses in accordance with the terms of this contract. Orders shall include the student's name, course title, course date and time, and contracted dollar amount of the course.

**3. TIME OF DELIVERY**

The Contractor shall conduct training on the date (time, day, month, and year) agreed to by the Contractor and the ordering activity.

**4. CANCELLATION AND RESCHEDULING**

- a. The ordering activity will notify the Contractor at least seventy-two (72) hours before the scheduled training date, if a student will be unable to attend. The Contractor will then permit the ordering activity to either cancel the order or reschedule the training at no additional charge. In the event the training class is rescheduled, the ordering activity will modify its original training order to specify the time and date of the rescheduled training class.
- b. In the event the ordering activity fails to cancel or reschedule a training course within the time frame specified in paragraph a, above, the ordering activity will be liable for the contracted dollar amount of the training course. The Contractor agrees to permit the ordering activity to reschedule a student who fails to attend a training class within ninety (90) days from the original course date, at no additional charge.
- c. The ordering activity reserves the right to substitute one student for another up to the first day of class.
- d. In the event the Contractor is unable to conduct training on the date agreed to by the Contractor and the ordering activity, the Contractor must notify the ordering activity at least seventy-two (72) hours before the scheduled training date.

**5. FOLLOW-UP SUPPORT**

The Contractor agrees to provide each student with unlimited telephone support or online support for a period of one (1) year from the completion of the training course. During this period, the student may contact the Contractor's instructors for refresher assistance and answers to related course curriculum questions.

## **6. PRICE FOR TRAINING**

The price that the ordering activity will be charged will be the ordering activity training price in effect at the time of order placement, or the ordering activity price in effect at the time the training course is conducted, whichever is less.

## **7. INVOICES AND PAYMENT**

Invoices for training shall be submitted by the Contractor after ordering activity completion of the training course. Charges for training must be paid in arrears (31 U.S.C. 3324). **PROMPT PAYMENT DISCOUNT, IF APPLICABLE, SHALL BE SHOWN ON THE INVOICE.**

## **8. FORMAT AND CONTENT OF TRAINING**

- a. The Contractor shall provide written materials (i.e., manuals, handbooks, texts, etc.) normally provided with course offerings. Such documentation will become the property of the student upon completion of the training class.
- b. **\*\*If applicable\*\*** For hands-on training courses, there must be a one-to-one assignment of IT equipment to students.
- c. The Contractor shall provide each student with a Certificate of Training at the completion of each training course.
- d. The Contractor shall provide the following information for each training course offered:
  - (1) The course title and a brief description of the course content, to include the course format (e.g., lecture, discussion, hands-on training);
  - (2) The length of the course;
  - (3) Mandatory and desirable prerequisites for student enrollment;
  - (4) The minimum and maximum number of students per class;
  - (5) The locations where the course is offered;
  - (6) Class schedules; and
  - (7) Price (per student, per class (if applicable)).
- e. For those courses conducted at the ordering activity's location, instructor travel charges (if applicable), including mileage and daily living expenses (e.g., per diem charges) are governed by Pub. L. 99-234 and FAR Part 31.205-46, and are reimbursable by the ordering activity on orders placed under the Multiple Award Schedule, as applicable, in effect on the date(s) the travel is performed. Contractors cannot use GSA city pair contracts. The Industrial Funding Fee does NOT apply to travel and per diem charges.
- f. For Online Training Courses, a copy of all training material must be available for electronic download by the students.

## **9. "NO CHARGE" TRAINING**

The Contractor shall describe any training provided with equipment and/or software provided under this contract, free of charge, in the space provided below.

Not applicable

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| <b>TERMS AND CONDITIONS APPLICABLE TO INFORMATION TECHNOLOGY (IT)<br/>PROFESSIONAL SERVICES (SPECIAL ITEM NUMBER 132-51)</b> |
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**\*\*\*NOTE:** *All non-professional labor categories must be incidental to, and used solely to support professional services, and cannot be purchased separately.*

**1. SCOPE**

- a. The prices, terms and conditions stated under Special Item Number 132-51 Information Technology Professional Services apply exclusively to IT Professional Services within the scope of this Information Technology Schedule.
- b. The Contractor shall provide services at the Contractor's facility and/or at the ordering activity location, as agreed to by the Contractor and the ordering activity.

**2. PERFORMANCE INCENTIVES I-FSS-60 Performance Incentives (April 2000)**

- a. Performance incentives may be agreed upon between the Contractor and the ordering activity on individual fixed price orders or Blanket Purchase Agreements under this contract.
- b. The ordering activity must establish a maximum performance incentive price for these services and/or total solutions on individual orders or Blanket Purchase Agreements.
- c. Incentives should be designed to relate results achieved by the contractor to specified targets. To the maximum extent practicable, ordering activities shall consider establishing incentives where performance is critical to the ordering activity's mission and incentives are likely to motivate the contractor. Incentives shall be based on objectively measurable tasks.

**3. ORDER**

- a. Agencies may use written orders, EDI orders, blanket purchase agreements, individual purchase orders, or task orders for ordering services under this contract. Blanket Purchase Agreements shall not extend beyond the end of the contract period; all services and delivery shall be made and the contract terms and conditions shall continue in effect until the completion of the order. Orders for tasks which extend beyond the fiscal year for which funds are available shall include FAR 52.232-19 (Deviation – May 2003) Availability of Funds for the Next Fiscal Year. The purchase order shall specify the availability of funds and the period for which funds are available.
- b. All task orders are subject to the terms and conditions of the contract. In the event of conflict between a task order and the contract, the contract will take precedence.

**4. PERFORMANCE OF SERVICES**

- a. The Contractor shall commence performance of services on the date agreed to by the Contractor and the ordering activity.
- b. The Contractor agrees to render services only during normal working hours, unless otherwise agreed to by the Contractor and the ordering activity.
- c. The ordering activity should include the criteria for satisfactory completion for each task in the Statement of Work or Delivery Order. Services shall be completed in a good and workmanlike manner.

d. Any Contractor travel required in the performance of IT Services must comply with the Federal Travel Regulation or Joint Travel Regulations, as applicable, in effect on the date(s) the travel is performed. Established Federal Government per diem rates will apply to all Contractor travel. Contractors cannot use GSA city pair contracts.

## **5. STOP-WORK ORDER (FAR 52.242-15) (AUG 1989)**

(a) The Contracting Officer may, at any time, by written order to the Contractor, require the Contractor to stop all, or any part, of the work called for by this contract for a period of 90 days after the order is delivered to the Contractor, and for any further period to which the parties may agree. The order shall be specifically identified as a stop-work order issued under this clause. Upon receipt of the order, the Contractor shall immediately comply with its terms and take all reasonable steps to minimize the incurrence of costs allocable to the work covered by the order during the period of work stoppage. Within a period of 90 days after a stop-work is delivered to the Contractor, or within any extension of that period to which the parties shall have agreed, the Contracting Officer shall either-

(1) Cancel the stop-work order; or

(2) Terminate the work covered by the order as provided in the Default, or the Termination for Convenience of the Government, clause of this contract.

(b) If a stop-work order issued under this clause is canceled or the period of the order or any extension thereof expires, the Contractor shall resume work. The Contracting Officer shall make an equitable adjustment in the delivery schedule or contract price, or both, and the contract shall be modified, in writing, accordingly, if-

(1) The stop-work order results in an increase in the time required for, or in the Contractor's cost properly allocable to, the performance of any part of this contract; and

(2) The Contractor asserts its right to the adjustment within 30 days after the end of the period of work stoppage; provided, that, if the Contracting Officer decides the facts justify the action, the Contracting Officer may receive and act upon the claim submitted at any time before final payment under this contract.

(c) If a stop-work order is not canceled and the work covered by the order is terminated for the convenience of the Government, the Contracting Officer shall allow reasonable costs resulting from the stop-work order in arriving at the termination settlement.

(d) If a stop-work order is not canceled and the work covered by the order is terminated for default, the Contracting Officer shall allow, by equitable adjustment or otherwise, reasonable costs resulting from the stop-work order.

## **6. INSPECTION OF SERVICES**

In accordance with FAR 52.212-4 CONTRACT TERMS AND CONDITIONS--COMMERCIAL ITEMS (MAR 2009) (DEVIATION I - FEB 2007) for Firm-Fixed Price orders and FAR 52.212-4 CONTRACT TERMS AND CONDITIONS --COMMERCIAL ITEMS (MAR 2009) (ALTERNATE I - OCT 2008) (DEVIATION I - FEB 2007) applies to Time-and-Materials and Labor-Hour Contracts orders placed under this contract.

## **7. RESPONSIBILITIES OF THE CONTRACTOR**

The Contractor shall comply with all laws, ordinances, and regulations (Federal, State, City, or otherwise) covering work of this character. If the end product of a task order is software, then FAR 52.227-14 (Dec 2007) Rights in Data - General, may apply.

## **8. RESPONSIBILITIES OF THE ORDERING ACTIVITY**

Subject to security regulations, the ordering activity shall permit Contractor access to all facilities necessary to perform the requisite IT Professional Services.

## **9. INDEPENDENT CONTRACTOR**

All IT Professional Services performed by the Contractor under the terms of this contract shall be as an independent Contractor, and not as an agent or employee of the ordering activity.

## **10. ORGANIZATIONAL CONFLICTS OF INTEREST**

### **a. Definitions.**

“Contractor” means the person, firm, unincorporated association, joint venture, partnership, or corporation that is a party to this contract.

“Contractor and its affiliates” and “Contractor or its affiliates” refers to the Contractor, its chief executives, directors, officers, subsidiaries, affiliates, subcontractors at any tier, and consultants and any joint venture involving the Contractor, any entity into or with which the Contractor subsequently merges or affiliates, or any other successor or assignee of the Contractor.

An “Organizational conflict of interest” exists when the nature of the work to be performed under a proposed ordering activity contract, without some restriction on ordering activities by the Contractor and its affiliates, may either (i) result in an unfair competitive advantage to the Contractor or its affiliates or (ii) impair the Contractor’s or its affiliates’ objectivity in performing contract work.

b. To avoid an organizational or financial conflict of interest and to avoid prejudicing the best interests of the ordering activity, ordering activities may place restrictions on the Contractors, its affiliates, chief executives, directors, subsidiaries and subcontractors at any tier when placing orders against schedule contracts. Such restrictions shall be consistent with FAR 9.505 and shall be designed to avoid, neutralize, or mitigate organizational conflicts of interest that might otherwise exist in situations related to individual orders placed against the schedule contract. Examples of situations, which may require restrictions, are provided at FAR 9.508.

## **11. INVOICES**

The Contractor, upon completion of the work ordered, shall submit invoices for IT Professional services. Progress payments may be authorized by the ordering activity on individual orders if appropriate. Progress payments shall be based upon completion of defined milestones or interim products. Invoices shall be submitted monthly for recurring services performed during the preceding month.

## **12. PAYMENTS**

For firm-fixed price orders the ordering activity shall pay the Contractor, upon submission of proper invoices or vouchers, the prices stipulated in this contract for service rendered and accepted. Progress payments shall be made only when authorized by the order. For time-and-materials orders, the Payments under Time-and-Materials and Labor-Hour Contracts at FAR 52.212-4 (MAR 2009) (ALTERNATE I – OCT 2008) (DEVIATION I – FEB 2007) applies to time-and-materials orders placed under this contract. For labor-hour orders, the Payment under Time-and-Materials and Labor-Hour Contracts at FAR 52.212-4 (MAR 2009) (ALTERNATE I – OCT 2008) (DEVIATION I – FEB 2007) applies to labor-hour orders placed under this contract. 52.216-31(Feb 2007) Time-and-Materials/Labor-Hour Proposal Requirements—Commercial Item Acquisition As prescribed in 16.601(e)(3), insert the following provision:

(a) The Government contemplates award of a Time-and-Materials or Labor-Hour type of contract resulting from this solicitation.



(b) The offeror must specify fixed hourly rates in its offer that include wages, overhead, general and administrative expenses, and profit. The offeror must specify whether the fixed hourly rate for each labor category applies to labor performed by—

- (1) The offeror;
- (2) Subcontractors; and/or
- (3) Divisions, subsidiaries, or affiliates of the offeror under a common control.

### 13. RESUMES

Resumes shall be provided to the GSA Contracting Officer or the user ordering activity upon request.

### 14. INCIDENTAL SUPPORT COSTS

Incidental support costs are available outside the scope of this contract. The costs will be negotiated separately with the ordering activity in accordance with the guidelines set forth in the FAR.

### 15. APPROVAL OF SUBCONTRACTS

The ordering activity may require that the Contractor receive, from the ordering activity's Contracting Officer, written consent before placing any subcontract for furnishing any of the work called for in a task order.

### 16. DESCRIPTION OF IT PROFESSIONAL SERVICES AND PRICING

- a. The Contractor shall provide a description of each type of IT Service offered under Special Item Numbers 132-51. IT Professional Services should be presented in the same manner as the Contractor sells to its commercial and other ordering activity customers. If the Contractor is proposing hourly rates, a description of all corresponding commercial job titles (labor categories) for those individuals who will perform the service should be provided.
- b. Pricing for all IT Professional Services shall be in accordance with the Contractor's customary commercial practices; e.g., hourly rates, monthly rates, term rates, and/or fixed prices, minimum general experience and minimum education.

| <u>Proposed IT Labor Category</u><br><u>Titles</u> | <u>Provide Specific IT Qualifications and Years of Experience</u>   | <u>Provide actual IT past performance Functional Responsibilities</u>      | <u>Provide Specific Educational Degree and/or Certification</u>                 | <u>If applicable Disc Offer</u><br>(%) |
|--|---|--|---|--|
| <u>Consultant</u>                                  | 4+ years exp.<br><br>Duties: Gather requirements, review business processes, design application & workflow, configure & test, conduct end user training | Works with end users to evaluate and solve technical problems              | Bachelor's degree in Business, accounting or information systems, or equivalent | GSA pricing with IFF                   |
| <u>ERP Business/ Architectural Specialist</u>      | 4+ yrs exp.<br><br>Duties: Gather requirements, review business processes,  | Determines the setup of ERP software in order to best meet customer needs. | Bachelor's degree in Business, accounting or information systems, or            | GSA pricing with IFF                   |

|                             |   |   |   |                      |
|-----------------------------|---|---|---|----------------------|
|                             | design application & workflow, configure & test, conduct end user training  |   | equivalent  |                      |
| <u>Help Desk Specialist</u> | 2+ yrs exp.<br><br>Duties: Provide follow-up, escalation, and resolution to tech support issues   | Provide telephone support including diagnosis & resolution of technical issues.                                   | Bachelor's degree in business, accounting, or information systems or equivalent                                       | GSA pricing with IFF |
| <u>Project Manager</u>      | 3+ yrs exp.<br><br>Duties: Leading projects, providing defined scope, ensure project is completed on schedule and within budget, create and maintain project plan, identify and mitigate risks, determining resource requirements, managing project budget and changes, providing updates to project owners | Develop & maintain project plan, schedule and communicate project status.   | Bachelor's degree in accounting, finance, logistics management, computer science or information systems or equivalent | GSA pricing with IFF |
| <u>Software Architect</u>   | 3+ yrs exp.<br><br>Duties: Gather technical requirements, install & configure database and ERP systems, implement database reporting infrastructure and reports, ongoing technical support for database/ERP system as needed  | Customize ERP software and setup integrations with other software solutions.                                      | Bachelor's degree in Business, accounting or information systems, or equivalent                                       | GSA pricing with IFF |
| <u>Strategic Planner</u>    | 5+ yrs exp.<br><br>Duties: Lead client meetings and strategy sessions, develop project scope and budget   | Lead the development of the project scope and authorize changes to scope. Escalation point for problems incurred. | Bachelor's degree in Business, MIS, Accounting or equivalent; advanced degree a plus                                  | GSA pricing with IFF |

## **INFORMATION RELATING TO THE PROFESSIONAL SERVICES OFFERED BY SOCIUS**

Socius, Latin for “partner” or “ally,” is an internationally recognized business consulting firm with a customer base of more than 1,000 clients and over 25 years of experience.

Socius specializes in providing ERP, CRM, Business Intelligence, and Collaboration solutions from Microsoft Dynamics and Sage, as well as technology based on Microsoft Office SharePoint Server. Headquartered in Dublin, Ohio, Socius proudly serves clients across the Midwest and beyond from its offices in Ohio, Kansas City, North Dakota, and California.

All of the above-referenced solutions are provided directly by Socius. As demonstrated by the materials submitted in Socius’ offering to the Government, Socius is authorized to perform these solutions as an approved agent of Microsoft, the publisher of the software.

Socius takes a unique approach to its consulting services. Socius’ relationships with its clients go beyond that of a typical vendor. By establishing close ties to its clients, Socius team members become proactive participants in meeting and exceeding client goals.

Socius’ methodology begins with the client. By ensuring the client understands Socius’ process and asking the client the right questions, Socius intimately understands the client’s business needs today and where the client is headed in the future. Benchmarking and future planning are included in all of Socius’ implementations because Socius believes in creating long-term, sustainable value through its solutions and empowering its clients to see the return they are receiving on their investments.

Socius does not view an implementation as the finish-line; it sees it as the starting point for an ongoing relationship in which it continues to educate and collaborate with its clients on the products and processes that will help them continue to succeed.

Through an extensive list of specialized consulting services and an array of software specific solution packages, Socius works to improve clients’ productivity, empower clients’ staff, streamline and automate clients’ business processes, and allow clients to better understand and connect with their customers and partners.

With more than 1,000 implementations of ERP and CRM software applications from Microsoft Dynamics, Sage, and SYSPRO, Socius’ business relationships are the best indicator of its experience and demonstrated excellence.

Socius is a Microsoft Gold Certified Partner and a Sage Authorized Partner. Socius is also a member of Interdyn (please see: <http://www.socius1.com/interdyn/>), an international group of independent Microsoft partners that together form the leading global partner for Microsoft Dynamics. As such, Socius offer clients all of the benefits of a large, multinational service provider while remaining the close-to-home business partner with the consultants the clients’ know, who know the clients’ business.

Socius is also one of six elite Microsoft Partners who span the U.S. and specialize in providing clients with ultra sophisticated Distribution solutions as part of the Advanced Distribution Partners (please see: <http://www.advanceddistributionsoftware.com/>).

In addition, Socius partners with Independent Software Vendors (ISVs), hardware vendors, CPA firms, and other IT firms to create complete and seamlessly integrated solutions for its clients. Socius is also proud to partner with vendors across the country to contribute to the ERP Software Blog (please see: <http://www.erpsoftwareblog.com/members/directory/socius/>) and the CRM SoftwareBlog (please see: <http://www.crmsoftwareblog.com/members/directory/socius/>). See our Company Profile on [FindAccountingSoftware.com](http://FindAccountingSoftware.com).

## Products and Services Pricelist

Socius provides ERP, CRM, Business Intelligence, and Collaboration solutions from Microsoft Dynamics, Sage, and Syspro, as well as technology based on Microsoft Office SharePoint Server. The software publisher (i.e., Microsoft, Sage, Syspro) sets the price for the software solutions.

In connection with the professional services it provides, Socius is willing to offer to the Government the reduced rate of \$164.40 per hour. As of January 1, 2011, Socius typically charges \$175 per hour for professional and training services.

| Labor Category                        | GSA Pricing<br>w/IFF |
|---------------------------------------|----------------------|
| Consultant                            | \$165.63             |
| ERP Business/Architectural Specialist | \$165.63             |
| Help Desk Specialist                  | \$165.63             |
| Project Manager                       | \$165.63             |
| Software Architect                    | \$165.63             |
| Strategic Planner                     | \$165.63             |

| Training Courses                                     | GSA Pricing<br>w/IFF |
|--|----------------------|
| Advanced Financial Analysis                          | \$165.63             |
| Analysis Cubes (Microsoft SQL 2005 and 2008)         | \$165.63             |
| Analysis Cubes for Excel (Microsoft SQL Server 2000) | \$165.63             |
| Analytical Accounting                                | \$165.63             |
| Enhanced Intrastat                                   | \$165.63             |
| Advanced Financial Analysis                          | \$165.63             |
| Enhanced Intrastat                                   | \$165.63             |
| Report Scheduler                                     | \$165.63             |
| Report Writer User's Guide                           | \$165.63             |

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|--|----------|
| SmartList Builder User's Guide With Excel Report Builder | \$165.63 |
| SQL Server Reporting Services Administrator's Guide      | \$165.63 |
| VAT Daybook  | \$165.63 |
| VAT Daybook (Canada)                                     | \$165.63 |
| Working with Crystal Reports                             | \$165.63 |
| Contract Administration                                  | \$165.63 |
| Depot Management   | \$165.63 |
| Preventive Maintenance                                   | \$165.63 |
| Returns Management                                       | \$165.63 |
| Service Call Management                                  | \$165.63 |
| Bank Reconciliation                                      | \$165.63 |
| Cash Flow Management                                     | \$165.63 |
| Cashbook Bank Management                                 | \$165.63 |
| Collections Management                                   | \$165.63 |
| Electronic Bank Management                               | \$165.63 |
| Electronic Banking                                       | \$165.63 |
| Fixed Assets Management                                  | \$165.63 |
| General Ledger   | \$165.63 |
| GST and Australian Taxes                                 | \$165.63 |
| Intercompany Processing                                  | \$165.63 |
| Multicurrency Management                                 | \$165.63 |
| Multidimensional Analysis                                | \$165.63 |
| Multilingual Checks                                      | \$165.63 |
| Payables Management                                      | \$165.63 |
| Payment Document Management                              | \$165.63 |
| Receivables Management                                   | \$165.63 |
| Scheduled Instalments                                    | \$165.63 |
| Advanced Human Resources                                 | \$165.63 |
| Advanced Payroll   | \$165.63 |
| Canadian Payroll   | \$165.63 |
| Human Resources  | \$165.63 |
| Payroll  | \$165.63 |
| Payroll Extensions                                       | \$165.63 |
| PTO Manager  | \$165.63 |

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| Bill of Materials   | \$165.63 |
| German Shipping Documents   | \$165.63 |
| Inventory Control   | \$165.63 |
| Invoicing   | \$165.63 |
| Purchase Order Enhancements   | \$165.63 |
| Purchase Order Processing   | \$165.63 |
| Sales Order Processing  | \$165.63 |
| Manufacturing Core Functions  | \$165.63 |
| Manufacturing Management Functions  | \$165.63 |
| Manufacturing Planning Functions  | \$165.63 |
| Manufacturing Production Functions  | \$165.63 |
| Manufacturing Setup   | \$165.63 |
| Not For Profit Accounting   | \$165.63 |
| Personal Data Keeper  | \$165.63 |
| Project Accounting Accounting Control Guide   | \$165.63 |
| Project Accounting Administrator's Guide  | \$165.63 |
| Project Accounting Billing Guide  | \$165.63 |
| Project Accounting Cost Management Guide  | \$165.63 |
| Audit Trails  | \$165.63 |
| Electronic Signatures   | \$165.63 |
| Integration Guide For Microsoft Retail Management System Headquarters                         | \$165.63 |
| Microsoft Dynamics CRM Adapter  | \$165.63 |
| Planning for Security   | \$165.63 |
| Professional Services Tools Library   | \$165.63 |
| System Administrator's Guide  | \$165.63 |
| System Setup Guide  | \$165.63 |
| System User's Guide   | \$165.63 |
| What's New in Microsoft Dynamics GP 10.0  | \$165.63 |
| What's New: Country/Region Specific Enhancements in Microsoft Dynamics GP 10.0 Service Pack 5 | \$165.63 |
| Workflow Administrator's Guide  | \$165.63 |

| Training Course Description                          | GSA Pricing<br>w/ IFF |
|--|-----------------------|
| Advanced Financial Analysis                          | \$165.63              |
| Analysis Cubes (Microsoft SQL 2005 and 2008)         | \$165.63              |
| Analysis Cubes for Excel (Microsoft SQL Server 2000) | \$165.63              |
| Analytical Accounting                                | \$165.63              |
| Enhanced Intrastat                                   | \$165.63              |
|  |                       |
| Report Scheduler                                     | \$165.63              |

**USA COMMITMENT TO PROMOTE  
SMALL BUSINESS PARTICIPATION  
PROCUREMENT PROGRAMS**

**PREAMBLE**

Socius1, LLC provides commercial products and services to ordering activities. We are committed to promoting participation of small, small disadvantaged and women-owned small businesses in our contracts. We pledge to provide opportunities to the small business community through reselling opportunities, mentor-protégé programs, joint ventures, teaming arrangements, and subcontracting.

**COMMITMENT**

To actively seek and partner with small businesses.

To identify, qualify, mentor and develop small, small disadvantaged and women-owned small businesses by purchasing from these businesses whenever practical.

To develop and promote company policy initiatives that demonstrate our support for awarding contracts and subcontracts to small business concerns.

To undertake significant efforts to determine the potential of small, small disadvantaged and women-owned small business to supply products and services to our company.

To insure procurement opportunities are designed to permit the maximum possible participation of small, small disadvantaged, and women-owned small businesses.

To attend business opportunity workshops, minority business enterprise seminars, trade fairs, procurement conferences, etc., to identify and increase small businesses with whom to partner.

To publicize in our marketing publications our interest in meeting small businesses that may be interested in subcontracting opportunities.

We signify our commitment to work in partnership with small, small disadvantaged and women-owned small businesses to promote and increase their participation in ordering activity contracts. To accelerate potential opportunities please contact Tricia Jarvis, CFO, 614.280.9880 x2003, [tjarvis@socius1.com](mailto:tjarvis@socius1.com), 800.649.6783 (fax).



BEST VALUE  
BLANKET PURCHASE AGREEMENT  
FEDERAL SUPPLY SCHEDULE

Socius1, LLC

In the spirit of the Federal Acquisition Streamlining Act (ordering activity) and Socius1, LLC enter into a cooperative agreement to further reduce the administrative costs of acquiring commercial items from the General Services Administration (GSA) Federal Supply Schedule Contract(s) \_\_\_\_\_.

Federal Supply Schedule contract BPAs eliminate contracting and open market costs such as: search for sources; the development of technical documents, solicitations and the evaluation of offers. Teaming Arrangements are permitted with Federal Supply Schedule Contractors in accordance with Federal Acquisition Regulation (FAR) 9.6.

This BPA will further decrease costs, reduce paperwork, and save time by eliminating the need for repetitive, individual purchases from the schedule contract. The end result is to create a purchasing mechanism for the ordering activity that works better and costs less.

Signatures

\_\_\_\_\_  
Ordering Activity

\_\_\_\_\_  
Date

\_\_\_\_\_  
Contractor

\_\_\_\_\_  
Date

BPA NUMBER\_\_\_\_\_

**(CUSTOMER NAME)**  
**BLANKET PURCHASE AGREEMENT**

Pursuant to GSA Federal Supply Schedule Contract Number(s)\_\_\_\_\_, Blanket Purchase Agreements, the Contractor agrees to the following terms of a Blanket Purchase Agreement (BPA) EXCLUSIVELY WITH (ordering activity):

- (1) The following contract items can be ordered under this BPA. All orders placed against this BPA are subject to the terms and conditions of the contract, except as noted below:

| MODEL NUMBER/PART NUMBER | *SPECIAL BPA DISCOUNT/PRICE |
|--------------------------|-----------------------------|
| _____                    | _____                       |
| _____                    | _____                       |
| _____                    | _____                       |

- (2) Delivery:

| DESTINATION | DELIVERY SCHEDULES / DATES |
|-------------|----------------------------|
| _____       | _____                      |
| _____       | _____                      |
| _____       | _____                      |

- (3) The ordering activity estimates, but does not guarantee, that the volume of purchases through this agreement will be \_\_\_\_\_.

- (4) This BPA does not obligate any funds.

- (5) This BPA expires on \_\_\_\_\_ or at the end of the contract period, whichever is earlier.

- (6) The following office(s) is hereby authorized to place orders under this BPA:

| OFFICE | POINT OF CONTACT |
|--------|------------------|
| _____  | _____            |
| _____  | _____            |
| _____  | _____            |

- (7) Orders will be placed against this BPA via Electronic Data Interchange (EDI), FAX, or paper.

- (8) Unless otherwise agreed to, all deliveries under this BPA must be accompanied by delivery tickets or sales slips that must contain the following information as a minimum:

- (a) Name of Contractor;
- (b) Contract Number;
- (c) BPA Number;
- (d) Model Number or National Stock Number (NSN);

- (e) Purchase Order Number;
- (f) Date of Purchase;
- (g) Quantity, Unit Price, and Extension of Each Item (unit prices and extensions need not be shown when incompatible with the use of automated systems; provided, that the invoice is itemized to show the information); and
- (h) Date of Shipment.

(9) The requirements of a proper invoice are specified in the Federal Supply Schedule contract. Invoices will be submitted to the address specified within the purchase order transmission issued against this BPA.

(10) The terms and conditions included in this BPA apply to all purchases made pursuant to it. In the event of an inconsistency between the provisions of this BPA and the Contractor's invoice, the provisions of this BPA will take precedence.

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**BASIC GUIDELINES FOR USING  
“CONTRACTOR TEAM ARRANGEMENTS”**

Federal Supply Schedule Contractors may use “Contractor Team Arrangements” (see FAR 9.6) to provide solutions when responding to a ordering activity requirements.

These Team Arrangements can be included under a Blanket Purchase Agreement (BPA). BPAs are permitted under all Federal Supply Schedule contracts.

Orders under a Team Arrangement are subject to terms and conditions of the Federal Supply Schedule Contract.

Participation in a Team Arrangement is limited to Federal Supply Schedule Contractors.

Customers should refer to FAR 9.6 for specific details on Team Arrangements.

Here is a general outline on how it works:

- The customer identifies their requirements.
- Federal Supply Schedule Contractors may individually meet the customers needs, or -
- Federal Supply Schedule Contractors may individually submit a Schedules “Team Solution” to meet the customer’s requirement.
- Customers make a best value selection.